

Travel Authority and Reimbursements Kaizen Event Report Out

Team : Hijackers

November 3 – November 7, 2008

The “Hijackers” Team



Team Members

■ Consultant	Jim Scott, Consultant TBM
■ Consultant	Mike Rohlf, DOM
■ Team leader(s)	Marcia Tope, Department of Human Services Jeff Terrell, Department of Human Services
■ Sub-team leader	Mike Coveyou, Iowa Department of Public Safety
■ Members	Jeff Quigle, Iowa Department of Public Safety Judy Ruble, Iowa Department of Public Safety Beth Chipp, Iowa Department of Public Safety Marty Deaton, Iowa Department of Public Safety Julie Hamilton, Iowa Department of Public Safety Deb Jones, Iowa Department of Public Safety Sue Petersen, Iowa Department of Public Safety Helen Butcher, Iowa Department of Public Safety Sherry Hutchison, Iowa Department of Public Safety Denise Benda, Iowa Department of Public Safety Melissa Stock, Iowa Department of Public Safety Kara Bryant, Iowa Department of Natural Resources Becky Peters, Iowa Workforce Development Trina Brietske, Iowa DAS/State Accounting Enterprise

Scope

Sue

- **This event will address the Travel Authority and Reimbursement process from the time the travel has been identified to the time the payment is received by the claimant.**

Goals

Mike

1. Reduce the lead-time.
2. Process error-free claim in five days or less.
3. Thirty day reimbursement for claimant.
4. Reduce the error rate on the claim forms.
5. Reduce the error rate for misuse or violations of the rules.

Objectives

Deb

1. Reduce the frustration of the traveler.
2. Reduce the frustration of those working the claim.
3. Identify the rules surrounding travel.
4. Gain and understand a more clear vision of the application of the rules and exceptions.
5. Improve the process.
6. Educate supervisors on the complete process.
7. Educate the traveler on the complete process.
8. Develop a checklist or cheat sheet for filling out the forms.
9. Improve communication throughout the process.
10. Improve the travel authority process.

Kaizen Methodology

Judy

- Clear objectives
- Team process
- Tight focus on time
- Quick & simple
- Necessary resources immediately available
- Immediate results (new process designed by end of week)
- 5S “mindset”, use the steps to support the event activities

Current Process

Marty



Brainstorming

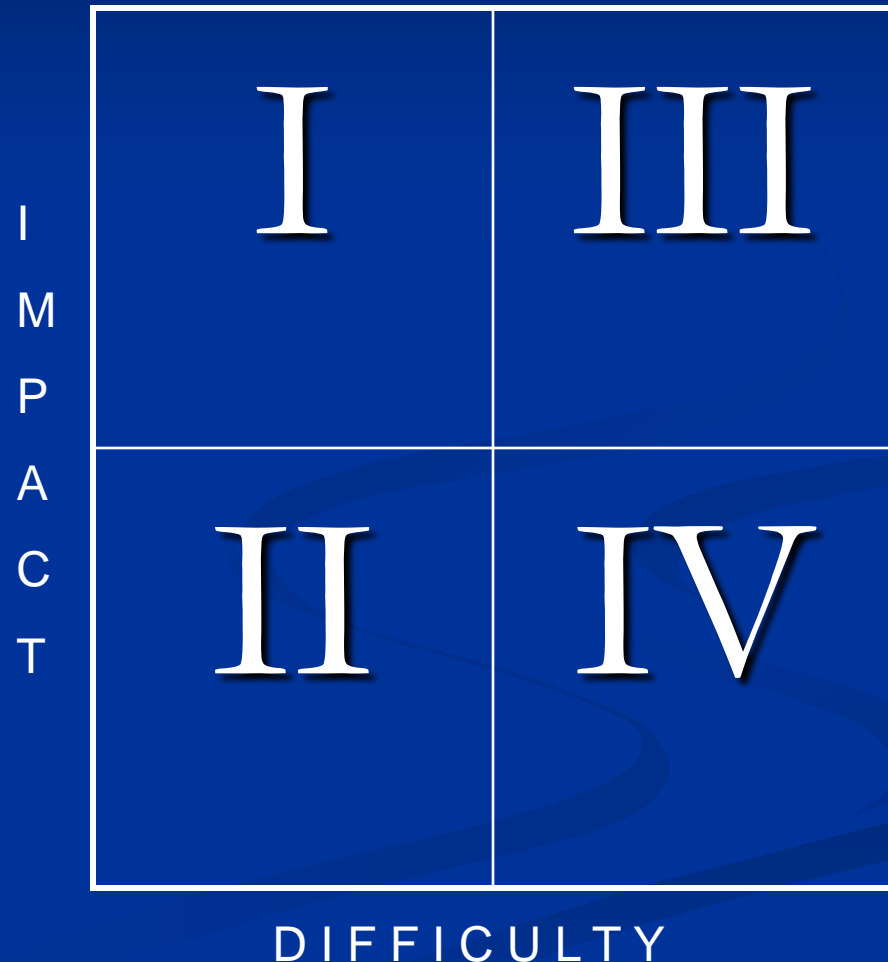
Trina

- Identified common themes
- Seven ideas to implement

De-selection Process

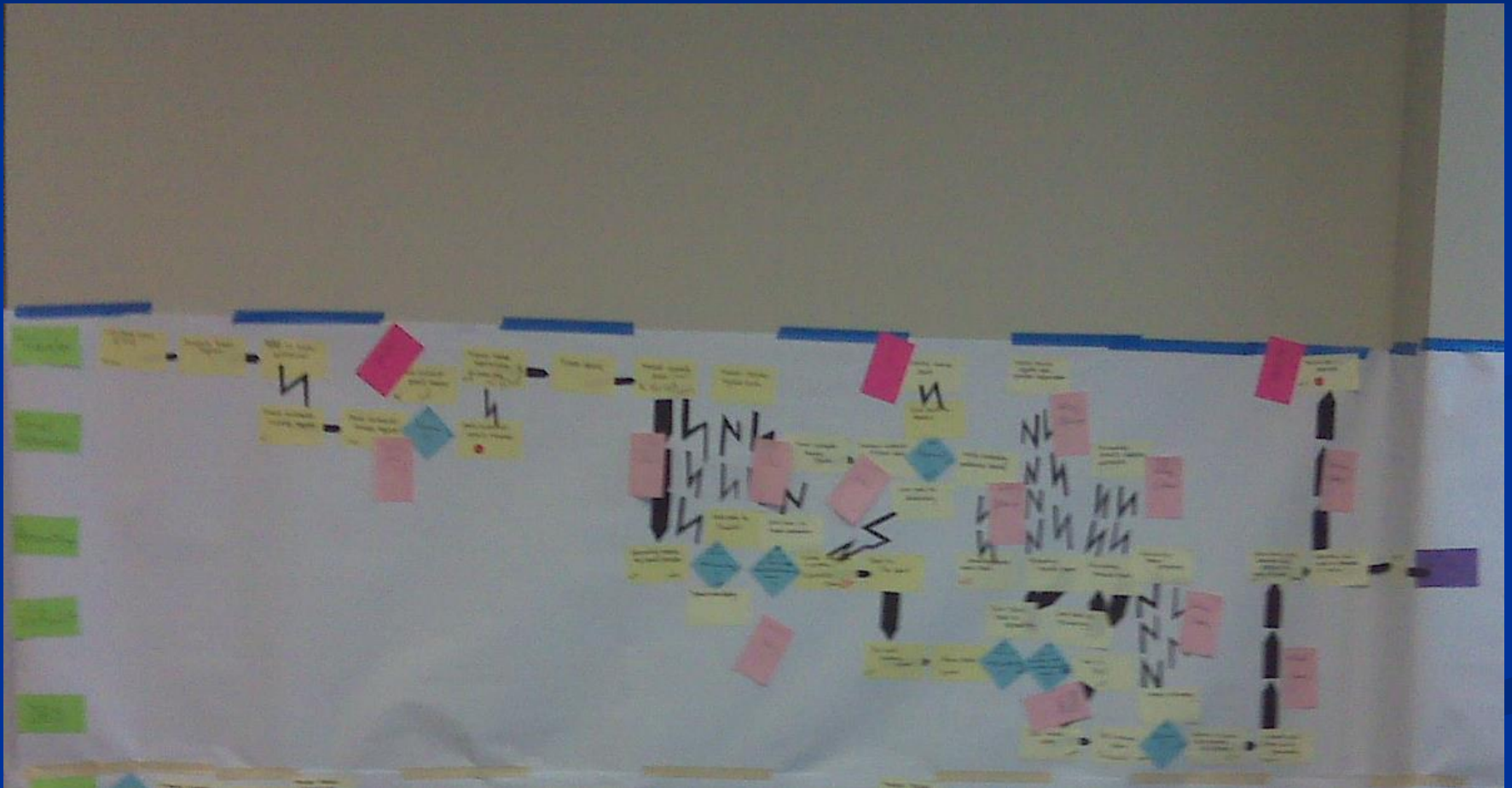
Julie

- Identifies
 - Impact to customer
 - Difficulty implementing
- Helps to rate/rank solutions to resolve issues while identifying ease of implementation



New Process

Denise



Results

Beth

	Current	New	
Total Steps	168	42	-75%
Total Delays	72	12	-83%
Average Delay Time - Days	173.5	25	-86%
Value Added Steps	4	4	0%
Decisions	37	11	-70%
Loop Backs	32	11	-66%
Total Handoffs	in state 8 out of state 15 international 23	in state 5 out of state 7 international 7	-37% -53% -70%
Lead Time - Days	178	26	-70%

Homework

Sherry

Item	Item Description	Person Responsible	Due Date
1	Document cost of Executive Council - Approval	Mike/Denise	12-1-08
2	Draft Proposal to eliminate Executive Council approval	Mike	12-1-08
3	Develop Training Team and Material	Marty	1-15-09
4	Train DCI Supervisors	Marty	1-31-09
5	Supervisors Train DCI Employees	Jim Saunders	2-28-09
6	Evaluate and adjust	Marty	3-31-09

Homework

Kara

Item	Item Description	Person Responsible	Due Date
7	Implement and Adjust – initial training	Marty	4-30-09
8	Training and Rollout across all divisions	Marty	7-1-09
9	Travel Form Modification	Jeff Q.	1-1-09
10	Review PDQs of Travel Coordinators	Tracy Hunt	1-1-09
11	Review and draft standardized procedure for travel policy	Jim Wachuta	1-1-09
12	Draft proposed rule change for flat rate payments for subsistence	Mike	2-1-09

Homework

Melissa

Item	Item Description	Person Responsible	Due Date
13	Research tax flat rate travel payments to employees	Dave Heuton	2-1-09
14	Research P-Card use and draft proposal	Dave Heuton	2-1-09
15	Implement standardized travel procedures and policy	Commissioner	7-1-09
16			
17			
18			

Team Member's Experience

Jeff

Helen

Julie

Comments:

**Jim Scott,
Consultant TBM**

**We welcome your
questions and comments!**

day one goals:

- identify log jams
- share frustrations – improve process
- speed up process decrease frustrations
- ensure policy and procedure in effect, but change paper process
- see process improve – agents get paid quicker
- better understanding of rules
- division during what should be doing
- clearer idea of where we are with travel claims
- identify delays and reimburse quickly
- streamline non-state employees – in/out state travel
- participate to find solution
- take ideas back to IWD
- survive the week – improve process

common themes – sweet spots

eliminate executive council approvals

DA's Directors approve travel

paperless system, web-based, scanned, share access to needed elec info

Poke Oke – make as “mistake proof” as possible

provide training - Q&A – clarifying what to do how to do it right first time

centralize travel coordinator function – eliminate loop backs

P-Cards will cover all employee travel costs --- in-state and out-of-state

Use “flat rate” for in-state expenses

Power DMS